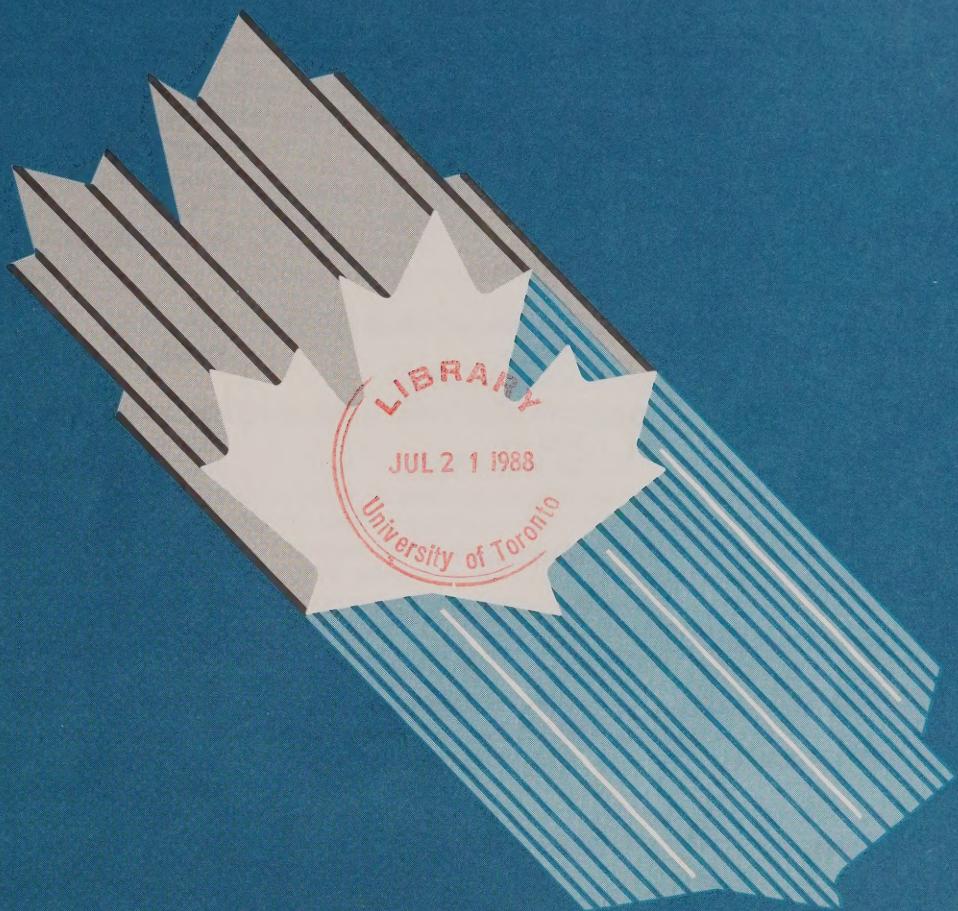


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Regional Industrial
Expansion

Ministry of State
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Canada

Expansion industrielle
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**Fishery Products —
Pacific Coast**

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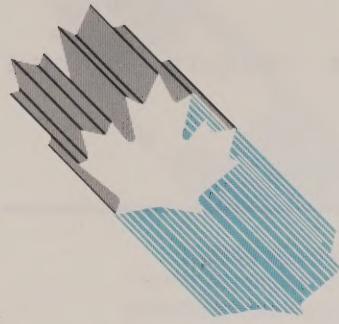
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INDUSTRY

PROFILE

FISHERY PRODUCTS — PACIFIC COAST

1988

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FOREWORD

• • • • •

In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to survival and growth. This Industry Profile is one of a series of papers which assess, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological and other key factors, and changes anticipated under the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the papers.

The series is being published as steps are being taken to create the new Department of Industry, Science and Technology from the consolidation of the Department of Regional Industrial Expansion and the Ministry of State for Science and Technology. It is my intention that the series will be updated on a regular basis and continue to be a product of the new department. I sincerely hope that these profiles will be informative to those interested in Canadian industrial development and serve as a basis for discussion of industrial trends, prospects and strategic directions.

The Canadian Fishery Products Industry includes the Atlantic Fishery, the Pacific Coast Fishery and the Freshwater Fishery. Industry Profiles have been prepared on:

- Atlantic Groundfish
- Atlantic Pelagics
- Atlantic Shellfish
- Pacific Coast Fishery

The present profile should be read in conjunction with the companion profiles.

1. Structure and Performance

Structure

The Pacific coast fishery processes primarily salmon and herring, with groundfish and shellfish making up the balance. This fishery accounted for 24 percent of total Canadian fishery products shipments in 1986 with a value of \$699 million. About 70 percent of the total Pacific coast production was frozen and canned salmon and other salmon products (fresh, smoked, roe), and 10 percent was herring roe. Groundfish accounted for about six percent of shipments, shellfish for about five percent, and other miscellaneous products made up the balance.

The Pacific coast fish processing industry is highly export-oriented. All of the herring roe produced and a major portion of the salmon production is exported. Most of the shellfish production, and about two-thirds of the groundfish, also is exported.

Employment in the fishery is highly seasonal, peaking in the summer. It has been estimated that about 7500 people were employed in fish processing at the peak of the season in British Columbia.

The west coast industry is dominated by fewer than a dozen companies, with British Columbia Packers Limited being the major producer. Most of the production of these companies is salmon and herring, although some are also involved in the shellfish, aquaculture, smoked fish and groundfish businesses. Most of the companies in the sector are privately held and Canadian-owned. There is one large co-operative, the Prince Rupert Fishermen's Co-operative Association, located in northern British Columbia.

To compensate for the seasonality of harvest of both the salmon and herring roe fisheries, most B.C. processing companies have diversified species and product capabilities. Some companies operate their own vessels, which ensure raw material supplies, while others rely on independent fishermen.

Minister

Canada

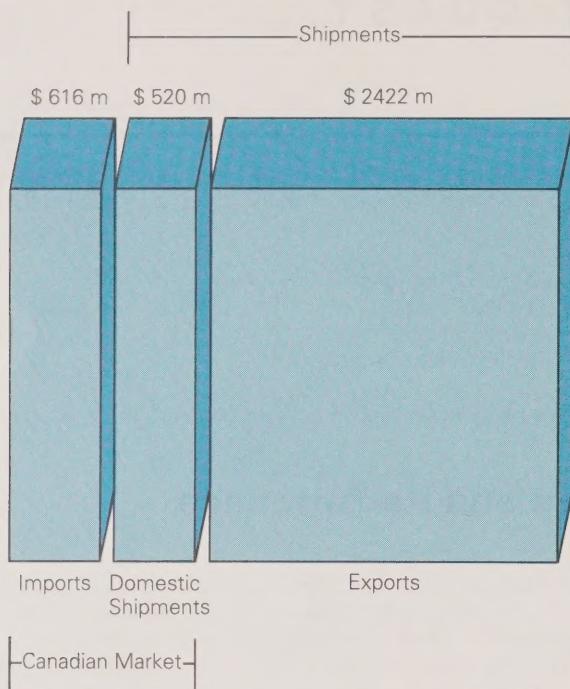


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*Fishery Products Industry**
Imports, Exports and Domestic Shipments
1986

**Includes total industry. Separate data for imports, exports and domestic shipments of Pacific Coast are not available.*

Salmon is fished and processed during the summer months of June through September. Canned salmon accounted for about half of the volume and value of total B.C. salmon production in 1986. There are about ten large cannery operations, with British Columbia Packers Limited accounting for about half of total output. British Columbia Packers Limited owns what is reported to be the largest salmon canning operation in the world. In the fresh/frozen/smoked sector, the larger companies predominate, but smaller enterprises and traders also are involved. Canadian salmon is sold to both the institutional and retail trades, with sales to the former sometimes being direct. Sales to the latter are usually made through brokers, distributors or trading houses which can offer a broad product line.

Canadian Pacific salmon landings totalled 104 500 tonnes in 1986, with a value of \$255 million. The world's major salmon producers are the United States (primarily Alaska), Japan and the U.S.S.R., followed by Canada (with almost 13 percent of the world harvest in 1985 figures). The major exporter is the United States, followed by Canada. The bulk of Japanese production is consumed domestically, with both the United States and Canada competing essentially as residual suppliers. In the European Community (E.C.), Canadian and U.S. exports compete with domestic and Norwegian farmed Atlantic salmon. Competition will increase from Norwegian and European salmon production, which is projected to reach 100 000 tonnes by 1990, compared with 58 800 tonnes in 1986.

Canadian regulations have prohibited the export of unprocessed pink and sockeye salmon, the two most important salmon species. Similar regulations have prohibited the export of roe herring. As a result of a General Agreement on Tariffs and Trade (GATT) panel ruling, these regulations will be replaced with landings requirements by 1989.

Frozen salmon exports were \$220.8 million in 1986, and accounted for slightly more than half of the value of all salmon exports. Japan is the principal market for frozen salmon, accounting for about half of Canadian exports of this product in 1986. However, Canada supplied only about 13 percent of Japan's imports in 1986, with the United States accounting for 85 percent. Canada's second most important market is France, which accounted for almost 15 percent of frozen salmon exports in 1986. The United States is Canada's major competitor, accounting for half of France's imports of frozen salmon, versus Canada's 27 percent share. In 1986, the United States was also an important market, accounting for almost 13 percent of Canadian exports, by value. Italy, Sweden, Denmark, the United Kingdom, and Switzerland also imported significant, but much lower, quantities of the Canadian product.

Most of the balance of 1986 salmon exports were canned salmon, at \$147.9 million. By far the largest market for canned salmon is the United Kingdom, which accounted for 58 percent of Canada's exports. In 1986, Canada supplied 43 percent of total U.K. imports, by value, slightly higher than the 42 percent supplied from the United States. Other important markets are Australia (12 percent of exports), New Zealand (six percent), and other E.C. countries, notably the Benelux countries and Italy (14 percent for the group).

A relatively new development in the Pacific fishery is salmon aquaculture. Participants in the industry range from small independent farmers with two or three cages in the water to large vertically integrated corporations controlling a number of farms. Several established B.C. processing firms have joint-venture marketing arrangements with salmon farmers, and there are also other types of joint ventures with Norwegian firms. Production volumes are currently small (about 1500 tonnes in 1987), but are projected to increase to 16 000 tonnes by 1990. This volume is still minor when compared with recent salmon landings from the traditional fishery (104 500 tonnes in 1986), but would represent a significant portion of supply during lower periods in the salmon cycle, such as in 1984 when wild salmon landings were only 50 431 tonnes.

The herring roe fishery takes place between February and April when the herring are carrying roe (i.e., eggs). The roe is extracted and salted by both large and small processing firms in British Columbia and exported to Japan. The very short season is highly regulated in order to ensure maintenance of the resource and the high quality required to meet Japanese market requirements. B.C. herring roe, in particular, is prime grade and is highly valued by the Japanese on the basis of subtle, but important, product quality differences. Herring roe is an important and traditional product in Japan for gift-giving, and consumption takes place primarily during the New Year season.

In 1986, Canadian herring roe accounted for 28 percent of estimated Japanese salted roe consumption of 10 200 tonnes. A further 25 percent of the Japanese market was supplied by the Japanese industry, which extracts and salts roe from both a small domestic catch and from frozen herring imported mainly from the United States. In addition, the United States directly supplied eight percent of the market for salted roe. The People's Republic of China, North Korea and Scandinavia all accounted for smaller volumes. In addition, of total Japanese imports of 403 tonnes of herring roe on kelp in 1986, Canada supplied 140 tonnes.

The Pacific groundfish industry is active in the fresh and frozen market. The principal species are Pacific halibut, hake, rockfish, Pacific perch and Pacific cod. Most boats fish a variety of species. Much of the production is exported, primarily as fresh sales to the western United States, with some frozen sales to the United Kingdom and Japan.

The Pacific shellfish industry is a small-enterprise fishery geared to the provision of high unit value specialty products. It accounted for about five percent of Pacific coast shipments by value in 1986. The key species are clams, followed by crabs, shrimp and oysters. In addition to domestic sales, crab and clams are exported to the western United States and Japan. There also have been some exports to Europe, notably Spain and Italy.

Performance

The performance of the B.C. industry is significantly affected by the variability of its two major species, salmon and herring.

There are five Pacific salmon species, each with a different growth cycle. In some years, the cycles are offsetting, while in others the low or high periods for the different species coincide, so that overall landings also show considerable variability. A peak in the salmon cycles in 1985 resulted in record landings of 108 000 tonnes, with landings in 1986 almost as high, at 103 000 tonnes. Preliminary figures for landings in 1987 were down significantly to 66 000 tonnes. The high levels of landings in 1985 and 1986 allowed replenishment of depleted canned salmon inventories.

Herring landings have declined sharply from the mid-70s (e.g., 97 000 tonnes in 1977). In 1986, herring landings were 16 300 tonnes, down from 25 767 tonnes the year before. 1987 landings were significantly higher at 36 585 tonnes.

The resource variability needs to be kept in mind in assessing the overall financial health of the industry. For example, a survey of the B.C. industry done for the 1978-82 period showed a declining trend in shareholders' equity and concluded that the industry was undercapitalized. A more recent survey based on 1986 results shows that shareholders' equity has more than doubled in the 1982-86 period, and the ratio of long-term debt to equity has been halved (to 0.5 in 1986). Recent high landings have allowed companies to return to a much more solid financial footing.

The industry has invested in sufficient capacity to handle the volumes in years of peak harvest. This leads to high fixed costs in other years. Some plant rationalization has taken place in the 1980s, but for the most part, the sector is stable.

2. Strengths and Weaknesses

Structural Factors

The structural strengths and weaknesses of the B.C. fish processing industry vary by species. In general, the B.C. industry has significant advantages in both salmon and herring processing, the two major areas. The industry has access to a reliable natural resource because of good management programs. As well, export and inspection regulations have resulted in a high-quality product, a factor which is internationally recognized. Disadvantages stem from the high costs resulting from short fishing seasons, resource cyclicity and high input costs, due in part to excess fleet capacity.



Canada has relatively little control over world salmon prices. Producers, however, have generally been able to sell to the limit of their supply, with some lowering of prices in high-volume years. The Canadian canned product is generally considered to be of superior quality to the competing foreign product. It tends to be concentrated more in the retail market than U.S. canned product, which is aimed more at institutional sales.

Resource management is particularly important for salmon species, which are unusually vulnerable to fishing, because the species are available for harvest over large parts of their migratory routes to the spawning grounds. Fishing must be tightly controlled since the salmon fleet has the capacity to decimate spawning runs. Canada controls the resource through the Pacific Salmon Stock Management Plan, and is also a signatory on international agreements governing transboundary stocks. Canada also has established a Salmonid Enhancement Program, designed to build the resource through hatchery programs and habitat improvements.

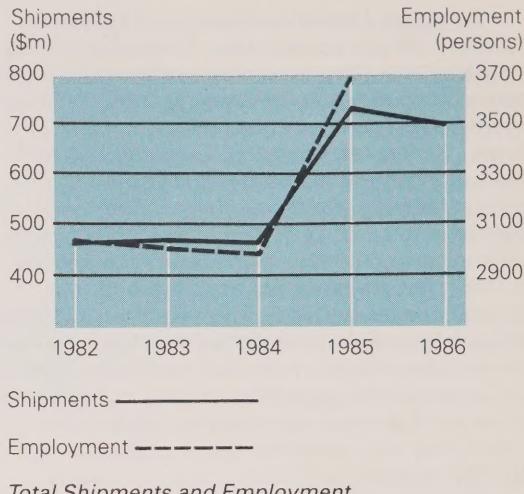
Given supply cyclicalities, plant capacity in some years is not fully utilized. As well, the season is relatively short and these factors combine to create high fixed costs. Therefore, the ability of the sector to continue to be profitable in a general economic downturn is somewhat limited.

Surplus capacity exists in the harvesting sector, and this is likely contributing to higher costs of fish supply. A financial study of the B.C. processing industry in 1983 concluded that the cost of fish supplied by the B.C. fishery was too high for the processing sector to earn an adequate return on investment. If the fleet were rationalized, the remaining participants in the primary sector would be able to earn adequate incomes while delivering fish to B.C. processors at more competitive prices. The report of the Commission on Pacific Fisheries Policy (the Pearse Report) proposed to reduce the size of the fleet by buying back some of the existing licences.

Regulations have played an important role in determining the structure of the Pacific coast salmon processing industry as they encouraged processing to be done in Canada. As explained in Section 3, Evolving Environment, these regulations will be changed as a consequence of a recent GATT panel ruling.

Unprocessed salmon is imported from Alaska to extend the operating seasons of northern B.C. processors. In 1986, more than 13 percent of the B.C. canned salmon pack was produced from U.S. salmon.

With respect to frozen salmon, B.C. processors are currently permitted by regulation to export only number-one grade sockeye and pink salmon. Lower grades of salmon are generally canned for export. Canadian processors have been somewhat locked into the canned salmon market, where consumption is not expected to increase significantly.



Total Shipments and Employment

The B.C. herring industry is in a strong competitive position due to its dominant supplier position in the high-value, Japanese salted herring roe market. B.C. processors have developed the expertise to process herring roe to the high standards required by the Japanese. In contrast, the United States ships most of its product as frozen round herring, with the roe being extracted in countries with lower wages or in Japan itself.

Herring landings vary substantially. As a result, the B.C. herring industry has over-capacity in both processing and in harvesting. However, actual production is in balance with demand, and this situation is expected to continue for the next few years.

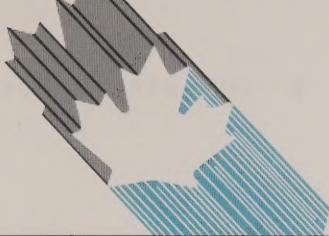
In groundfish and shellfish, the B.C. industry has the advantage of proximity to a large market in the northwestern United States and benefits from a growing consumer acceptance of seafood.

Trade-related Factors

Tariffs and trade restrictions vary both by market and by product. Exports of canned salmon face a 5.5 percent duty in the E.C. while exports of frozen salmon are dutiable at two percent.

Canadian herring roe is exported to Japan in extracted form, packed in brine. This product faces a 12 percent duty. However, frozen round herring and frozen roe can be exported to Japan under a six percent tariff. This favours the import by Japan of Alaskan product, which is normally exported "roe-in". Food herring and roe herring are subject to global quotas in Japan. In the Japanese market, frozen salmon is subject to a three percent duty and salmon roe faces a five percent duty.

In the U.S. market, imports of canned salmon (not in oil) are dutiable at three percent, canned salmon in oil faces a tariff of 12.5 percent, and smoked salmon has a tariff of five percent. Frozen salmon enters the United States duty-free.



Imports of frozen and smoked salmon into Australia are prohibited or restricted. Australia is an important market for canned salmon, and would likely be a major market for frozen and smoked salmon if the import restrictions were not in place. New Zealand, another important salmon market, also has restrictions on the importation of frozen and smoked salmon. However, New Zealand is expected to authorize imports of consumer packs of frozen salmon in the near future.

The bulk of Pacific groundfish exports are in fresh form to the U.S. market. The tariffs on fresh fish are low or non-existent and do not limit trade. Groundfish exports to Japan are subject to quota restrictions and significant tariff protection. In the E.C., Pacific halibut faces a tariff rate nearly double the rate applied to imports of the Atlantic species. The United Kingdom is the major market for this product.

Canadian tariffs on imports of prepared or preserved salmon are three percent, and other salmon products enter free. The Canadian import duty on herring roe is five percent.

Under the Canada-U.S. Free Trade Agreement (FTA), Canadian and U.S. tariffs on canned salmon and smoked salmon will be phased out over five years.

Technological Factors

The Pacific coast industry has been slow to develop new technologies or innovative products, largely because existing technologies and products have satisfied market and profit requirements. Most technological innovation has been process-related, rather than oriented towards new products.

With respect to salmon canning, the basic operations have remained unchanged for many decades. In recent years, advances in electronics and in computer technology have led to improvements in process control, resulting in enhanced production efficiency and quality assurance. The introduction of the two-piece can (one seam instead of three), together with computerized electronic defect detectors, have been particularly significant advances. Canadian firms are at least as advanced as their competitors in the United States in this regard. Some efforts are being made to automate more of the salmon canning process, particularly in response to the relatively high labour costs in British Columbia.

With regard to aquaculture, Norway has been a world leader in salmon farming and it expanded production to almost 46 000 tonnes in 1986. Several other countries, including Scotland, New Zealand and Canada, are rapidly developing salmon aquaculture capability. The Pacific coast has salmon farming conditions similar to Norway's, due to the availability of sheltered inlets, suitable water temperatures and salinity. Canada has been very successful in adapting existing aquaculture techniques to B.C. coast conditions.

Aquaculture of shellfish is limited as it is a labour-intensive, small enterprise operation. Commercial production to date has been very small.

B.C. processors have developed the technical expertise necessary to produce herring roe for the Japanese market, but the operation is not a technology-intensive one. Technological factors are not particularly important in the B.C. groundfish fisheries, since most of the product is sold fresh.

Other Factors

The Department of Fisheries and Oceans (DFO) regulates the fishery in order to conserve stocks and allocate the harvest. This is done through issuance of fishing licences. In the case of herring, because roe is an important end product, it is crucial that a balance be maintained to ensure a sustained resource. As a result, the harvest is very closely controlled.

Implementation of the Salmonid Enhancement Program and the negotiation of an international treaty between the United States and Canada on salmon management are major elements in the conservation of the salmon resource. In the case of salmon aquaculture, various regulatory and jurisdictional questions are under discussion. Their resolution is necessary to facilitate and maintain control over habitat utilization and disease prevention procedures.

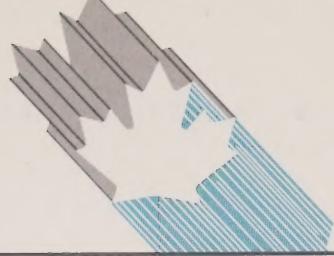
Processing plants are subject to DFO inspection requirements and are licenced by provincial authorities. In contrast, the United States has no nation-wide inspection program. Production and/or export of some specific product forms are controlled under the Fisheries Act administered by DFO.

DFO policy prohibits the granting of fishing licences to any firm with more than 49 percent foreign ownership. This limits foreign investment in those processing firms which are vertically integrated and hold fishing licences.

3. Evolving Environment

Future demand for fishery products will remain a function of changing tastes, health considerations, income growth and the price of alternative protein sources. Resource availability and management will remain key issues.

Accurate salmon resource projections are difficult to make because of the conflicting influences of habitat change, natural breeding cycles and changes in ocean currents and other marine environment conditions. However, extensive measures to rebuild salmon stocks are under way and overall landings may increase as a result.



The commercial salmon fishery faces competition for the resource from the native and sport fisheries. Further, as there are many unresolved aboriginal claims in British Columbia, there is at present considerable uncertainty regarding the potential impact that litigated or negotiated settlement of such claims may have on resource access for the commercial fishery.

Access to salmon and herring resources by Canadian processors may also become less certain because of a recent GATT panel ruling which found that Canada's export restrictions on unprocessed pink and sockeye salmon and herring are inconsistent with Article XI:1 of the GATT. Canada plans to replace these regulations with a requirement that all fish be landed in Canada prior to processing or export.

In the absence of export restrictions, it is possible that unprocessed fish would be exported to Washington State because wages there are lower than in British Columbia. Relocation of Canadian canneries might also occur. However, market forces may lead to some reduction in the difference in wage rates. In northern British Columbia, continued access to Alaskan fish is expected to secure the industry's position.

Output of farmed salmon from British Columbia can be expected to increase to several thousand tonnes over the next decade (approximately 16 000 tonnes by 1990). World output of farmed salmon is projected to increase from 93 000 tonnes to 150 000 tonnes by 1990. The increasing supply of salmon from aquaculture may eventually ease the cyclical and seasonality of the salmon processing industry. Farmed salmon will offer increasing competition to the traditional Canadian industry, both domestically and in export markets. Currently, most of the output is sold fresh or smoked, but as volumes increase, product diversification will be required. Because farmed salmon is a relatively high cost source of fish, high-valued product forms will have to be developed. Because of location, B.C. producers should have an advantage against foreign suppliers in North America, and particularly in the western United States.

Aquaculture of a number of shellfish species is well-established, and may soon become a more significant component of the west coast commercial fisheries.

Roe herring is being harvested to the limit of the supply which prudent resource management allows. There is a reasonable supply-demand balance at present, and it is not expected to change in the next two or three years. However, markets are developing for new types of roe products which do not depend on high-quality Pacific herring roe. Flavoured Atlantic roe, a lower-quality convenience product, has been successful with younger Japanese consumers. However, this product has created a new market which is distinct from the market for the traditional, high-quality B.C. roe.

In the absence of export restrictions on herring, B.C. processors may lose some of the herring resource. It may be bid away by U.S. firms, who would sell it to Japan in roe-in form, or by the Japanese, who would do their own processing. New regulations which require landing of fish at Canadian ports before exporting, and ownership of a portion of the herring fleet by B.C. processors should facilitate continued processing in Canada.

The FTA is unlikely to affect trade in canned salmon because the United States is not a major destination for this product. Although the U.S. tariff on canned salmon in oil is relatively high, its removal will have little effect because the most widely accepted product form is salmon canned without oil or other additives, except salt. Tariffs on the latter are low and equal in Canada and the United States, so their removal is unlikely to have a significant impact.

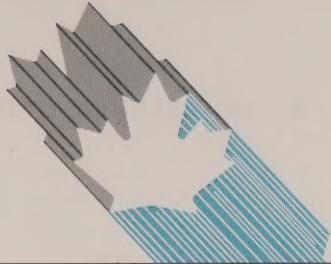
The five percent U.S. tariff on smoked salmon is also to be phased out over five years under the FTA, and this may mean an advantage to B.C. salmon aquaculture producers who will be looking for new markets as their production expands.

Existing tariffs in the United States for groundfish and shellfish have not significantly affected trade patterns, so tariff reduction under the FTA will not have a large impact on these industries.

4. Competitiveness Assessment

Overall, Canadian salmon processing is competitive. Salmon processors have adapted to dynamic market conditions and generally sell to the limit of their supply. Although there is pressure at the premium end of the frozen salmon market from Norwegian farm-raised salmon and at the low end of the market from huge volumes of Alaskan salmon, Canada should be able to hold or to increase existing export markets in which it has a good reputation for quality and a traditional market presence. Rationalization of the fleet may be important over the longer term for Canada to maintain its competitiveness. Development of Canadian salmon aquaculture, while still in the early developmental stage, also will improve the Canadian competitive position in the longer term by allowing the industry to meet a broader range of market demand. The future impact of aquaculture on the traditional Canadian industry remains to be determined.

The B.C. herring roe industry is competitive, and holds a dominant market position in the traditional, high-end Japanese roe market. It is expected that this situation will continue for the foreseeable future, although it will require continued rigorous management of the herring resource to ensure a reasonable supply-demand balance. New roe products (e.g. those made from Atlantic herring roe), seem to be expanding the total roe market, rather than displacing the B.C. product.



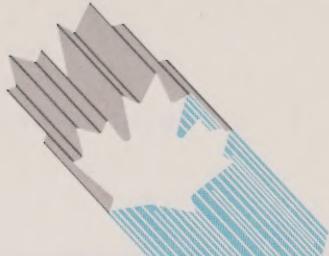
The Pacific groundfish industry should continue to benefit from market growth trends, particularly for fresh fish in the United States, while the shellfish industry will continue to be competitive in both domestic and export markets.

The FTA is expected to have a limited, though positive, impact on the Pacific coast fishery through the elimination of remaining tariffs, particularly the U.S. tariff on smoked salmon.

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PRINCIPAL STATISTICS

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Because breakdowns for the Pacific Coast sub-sector are not available, most of the data presented here are for the Canadian fishery products sector as a whole.

	1973	1982	1983	1984	1985	1986
Establishments	330	348**	392	397	390	N/A
Employment	21 424	25 382	24 577	24 372	26 964	N/A
Shipments (\$ millions)	748	1 904	1 887	1 852	2 493	2 942
Shipments ('000 tonnes)	538	681	647	666	783	832
Landed values (\$ millions)	321	888	880	904	1 131	1 330
Landings ('000 tonnes)	1 118	1 413	1 349	1 278	1 446	1 510
Profits after tax (\$ millions) (% of income)	34.3 5.2	(73.7) —	(41.9) —	9.7 .5	N/A N/A	N/A N/A
Pacific Coast						
	1973	1982	1983	1984	1985	Preliminary 1986
Establishments	46	50	49	49	47	N/A
Employment	3 702	3 040	3 007	2 972	3 695	N/A
Shipments (\$ millions)	285	467	472	467	728	699
Shipments ('000 tonnes)	N/A	115	133	126	158	171
Landed values (\$ millions)	130	240	210	243	378	385
Landings ('000 tonnes)	184	158	192	169	214	225

TRADE STATISTICS

	1973	1982	1983	1984	1985	1986
Exports (\$ millions)	499	1 612	1 569	1 597	1 859	2 422
Domestic Shipments (\$ millions)	249	292	318	255	634	520
Imports (\$ millions)	111	365	441	514	496	616
Canadian market (\$ millions)	360	657	759	769	1 130	1 136
Exports as % of shipments	67	85	83	86	75	82
Imports as % of domestic market	31	55	58	67	44	54
Source of imports						
				Central and South America		
		U.S.	E.C.		Japan	Others
(% of total value)	1982	59	3	11	6	21
	1983	57	5	9	7	25
	1984	56	4	8	7	25
	1985	54	8	10	7	21
	1986	51	8	7	7	27

TRADE STATISTICS (cont.)

Destination of exports	U.S.	Japan	E.C.	Other Europe	Others
(% of total value)					
1982	55	15	16	7	7
1983	62	12	16	4	6
1984	61	15	13	3	8
1985	61	17	14	2	6
1986	59	18	14	3	6

REGIONAL DISTRIBUTION — Average over the last 3 years

	Atlantic	Quebec	Ontario	Prairies	B.C.
Establishments — % of total	73	10	4	1	12
Employment — % of total	77	8	N/A	N/A	13
Shipments — % of total		Atlantic Coast (Including Quebec)	Inland Fisheries	Pacific Coast	
		69	5	26	

MAJOR FIRMS — Pacific Coast

Name	Ownership	Location of Major Plants
British Columbia Packers Limited	Canadian	British Columbia
Prince Rupert Fishermen's Co-operative Association	Canadian	British Columbia

* SIC on 1980 basis

** Estimated

STATISTIQUES COMMERCIALES

(en % de la valeur totale)	1982	55	15	16	7	7
E.-U.	Japon	CEE	Pays d'Europe	d'Europe	Autres	Autres
Destination des exportations						
1983	62	12	16	4	6	6
1984	61	15	13	3	8	8
1985	61	17	13	2	6	6
1986	59	18	14	3	6	6

COTE DU PACIFIQUE

(en % de la valeur totale)	1982	59	3	11	6	21
Source des importations						
Amérique						
E.-U.						
Centre et Sud						
Autres						
(en % du marché intérieur)	31	55	58	67	44	54
Importations						
(en % des expéditions)	67	85	83	86	75	82
Marché intérieur**	360	657	759	769	1 130	1 136
Importations**	111	365	441	514	496	616
Expéditions intérieures**	249	292	318	255	634	520
Exportations**	499	1 612	1 569	1 597	1 859	2 422
1973	1982	1983	1984	1985	1986	

STATISTIQUES COMMERCIALES

Côte du Pacifique						
Données préliminaires						
Débarquements***	184	158	192	169	214	225
Valeur des débarquements**	130	240	210	243	378	385
Expéditions***	n.d.	115	133	126	158	171
Expéditions**	285	467	472	467	728	699
Emplois	3 702	3 040	3 007	2 972	3 695	n.d.
Établissements	46	50	49	49	47	n.d.
1973	1982	1983	1984	1985	1986	

Comme nous ne disposons pas de ventilations détaillées pour le poste de la côte du Pacifique, la plupart des données qui figurent ici concernent le secteur canadien des produits de la pêche dans son ensemble.

PRINCIPALES STATISTIQUES

CTI 102*

CTI 102*

Objet : Pêche — Côte du Pacifique
 Ministre de l'Expansion Industrielle régionale
 de consommation
 industrielles des services et des biens

Pour de plus amples renseignements sur ce dossier, s'adresser à :

K1A 0H5
 Ottawa (Ontario)
 235, rue Queen

Le saumon fumé. Pâche existe encore, surtout les droits américains sur la pâche, bien que grâce à l'élimination des droits de douane limitée, la pâche est de libre-échange devrait avoir un effet à la fois sur les marchés intérieurs et extérieurs. L'accord de libre-échange devrait continuer de bénéficier de l'expansion du produit continué de la pâche du fond du Pacifique.

La pâche total de la pâche britannique. Les nouveaux tarifs de la pâche de hareng de l'Atlantique, semblent élargir le marché afin de maintenir un équilibre raisonnable entre l'offre et la demande. Les nouveaux droits de la pâche de harengs afin de maintenir un équilibre raisonnable concurrençant. Elle devrait continuer de l'être, mais cela dépendra du contrôle rigoureux des réserves commerciales. Elle principal fournisseur de la pâche de la Colombie-Britannique, principale source sur le marché japonais, est

La pâche de la pâche de hareng de la Colombie-Britannique de la pâche traditionnelle au Canada. L'industrie de la pâche traditionnelle sur détermine les répercussions de cette technique sur une demande diversifiée, cependant, il reste à l'industrie canadienne, lui permettant de répondre à ses débuts, devrait aussi raffermir la compétitivité de sa filière canadienne, qui n'en est encore qu'à

A plus long terme, l'expansion de la pâche canadienne de la pâche pour la compétitivité du Canada.

La pâche de la pâche de ses produits. La rationalisation d'exportation du Québec depuis longtemps en conservant ou accroître la part des marchés canadiennes de traitement est concurrence. Ces dernières se sont adaptées au jeu des forces du marché et, en général, elles réussissent à écouler toute leur production. Même si il y a une forte demande pour le saumon surgelé de qualité supérieure provenant des vîviers norvégiens et, en Alaska, l'industrie canadienne devrait pouvoir même temps, pour d'énormes volumes de saumon de la même manière pour le saumon surgelé de qualité toutefois, ce produit a ouvert un nouveau créneau toutefois, ce produit a ouvert un nouveau créneau succès après des jeunes consommateurs japonais.

Dans l'ensemble, le saumon traité par les usines canadiennes de traitement est concurrence. Ces dernières se sont adaptées au jeu des forces du

4. **Evaluation de la compétitivité**

Il aura donc pas d'effet important sur ces industries. Les droits de douane en vigueur aux États-Unis pour le poisson de fond, les多层次es et les échanges, la réduction des droits en vertu de l'accord sur les crustacés n'ont pas eu d'influence sensible sur les

Les droits de douane débouchent sur les salmoïques et la recherche pourraient également sur ces industries.

En vertu de l'accord, les droits de douane

abolition a peu de chances d'avoir un effet notable.

Et idem, au Canada et aux États-Unis, leur

huile n'autre additif, à l'exception du sel, qui se vend le mieux. Comme les droits sur ce produit sont faibles

peu d'effet, car c'est le saumon en conserve sans huile soit relativement élevés, leur abolition aura

l'effet sur le commerce du saumon en conserve, car

il est peu probable que l'accord de libre-échange

cessera spécie au Canada.

Les rouges et les japonais pourraient faciliter le traitement des flots de pêche au hareng appartenant à des

canadiens avant l'exportation, contribue au fait qu'une débouchement entrepises. Le nouveau règlement sur les

partie des flots de pêche au hareng appartenant à des

canadiens avant l'exportation, contribue au fait qu'une

distinction de celle de la Colombie-Britannique.

En Colombie-Britannique, en l'absence de

restrictions à l'exportation du poisson aux ports

traitement pourraient perdre une partie de leurs

ressources. Des entreprises américaines pourraient

se emparer pour les revenus au Japon avec

ressources. Des entreprises américaines pourraient

trouver des succès après des jeunes consommateurs japonais.

La consommation de qualité inférieure, connaît du succès après des jeunes consommateurs japonais.

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PECHE — COTE DU PACIFIQUE

3. Evolution de l'environnement

La demande de poisson et de produits dérivés restera toujours fonction de l'évolution des goûts, du souci d'une saine alimentation, de la croissance des revenus et du prix des autres sources de protéines, aussi la disponibilité et la gestion des ressources resteront-elles des questions clés.

Il est difficile de prévoir exactement l'importance des réserves de saumon à cause des effets cycliques de reproduction naturelle, du changement des courants océaniques et de l'évolution du milieu marin. Toutefois, les grands projets en cours, en vue de la reconstruction des réserves de saumon, pourraient faire augmenter le volume des débarquements.

La demande de poisson a toutefois appartenant à des intérêts étrangers dans une proportion supérieure à 49 p. 100, ce qui limite l'investissement étranger dans les usines de traitement à intégration verticale et titulaires de permis de pêche.

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3. Evolution de l'environnement

Les usines de traitement de la Colombie-Britannique ont acquis la technologie nécessaire pour produire de la rouge de hareng pour le marché japonais, mais cette opération est sans grande contenu technologique. Pour la pêche de poissons de fond de Colombie-Britannique, la technologie n'a pas grande importance car le produit est presque entièrement vendu frais.

Facteurs technologiques

Les variétés d'un marché à l'autre et du produit à l'autre. La CE impose des droits de 5,5 p. 100 sur les importations de saumon en conserve et de 2 p. 100 sur le saumon surgelé.

La rouge, déjà exportée et marinée, est exportée au Japon, où elle est frappée d'un droit de 12 p. 100. Les importations de hareng rouge surgelé et de hareng mariné sont soumises à un taux de 6 p. 100. Le rouge surgelé est donc un produit intéressant pour les Japonais. Le hareng mariné est quelque chose de nouveau pour les Japonais. Les droits de 3 p. 100, et les coûts de saumon sont soumis à des droits de 3 p. 100, et les coûts de saumon sont soumis à des droits de 5 p. 100. Les Etats-Unis perçoivent des droits de 3 p. 100 sur le saumon en conserve sans huile, de 12,5 p. 100 sur le saumon en conserve à l'huile et de 5 p. 100 sur le saumon fumé. Les Etats-Unis perçoivent des droits de 5 p. 100 sur le saumon fumé. Le saumon surgelé peut y être importé en franchise.

L'Australie interdit ou limite les importations de saumon surgelé ou fumé. Ce pays est un marché important pour le saumon en conserve et pourrait être un débouché majeur pour le saumon australien. La Nouvelle-Zélande, autre marché intéressant pour le saumon, impose aussi des droits de 5 p. 100 sur le saumon surgelé et de 2 p. 100 sur le saumon fumé. La Nouvelle-Zélande, autre marché à l'importation, impose aussi des droits de 5 p. 100 sur le saumon surgelé et de 2 p. 100 sur le saumon fumé. Toutefois, la Nouvelle-Zélande pourrait bien être autorisé à l'importation de saumon surgelé, emballe, pour la consommation directe.

Facteurs liés au commerce

A titre de principal fournisseur du très lucratif marché japonais de la rouge de hareng saumé, l'industrie du hareng de la Colombie-Britannique a un certain avantage concurrentiel. Les usines de traitement ont mis au point une technique pour conserver la rouge de hareng selon les normes élévées exigées par les Japonais. Par contre, les États-Unis expédient la plus grande partie de leur production sous forme de hareng entier surgelé, la très variable qualité du hareng de la Colombie-Britannique connaît une superficie tant sur le plan du traitement que des prix. Toutefois, la production réelle correspond à la demande du marché. Comme les débarquements de harengs sont très variables, l'industrie du hareng de la Colombie-Britannique connaît une superficie tant sur le plan du traitement que des prix. Toutefois, la production réelle correspond à la demande du marché. Les crustacés, l'industrie de la Colombie-Britannique devrait changer au cours des prochaines années. Pour les poissons de fond, les mollusques et les crustacés, l'industrie de la Colombie-Britannique bénéfice de la proximité de la population du nord-ouest des États-Unis et de la population croissante des fruits de mer auparavant consommateurs.

Les investissements fats par cette industrie au chapitre des installations ont permis de stopper les grands volumes débarrassés au cours des meilleures saisons, cette situation conduisant à des frais fixes plus élevés les autres années. Même si, au cours des années 80, l'industrie a procédé à la rationalisation de certaines usines, dans l'ensemble le secteur est stable.

Les débarquements de harengs sont nettement moins abondants qu'au milieu des années 70, soit 97 000 tonnes en 1977. En 1986, les prises de harengs atteignaient 16 300 tonnes contre 767 1986 tonnes précédentes et, en 1987, elles étaient de 36 585 tonnes.

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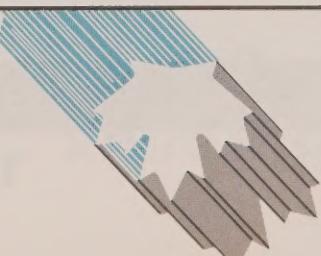
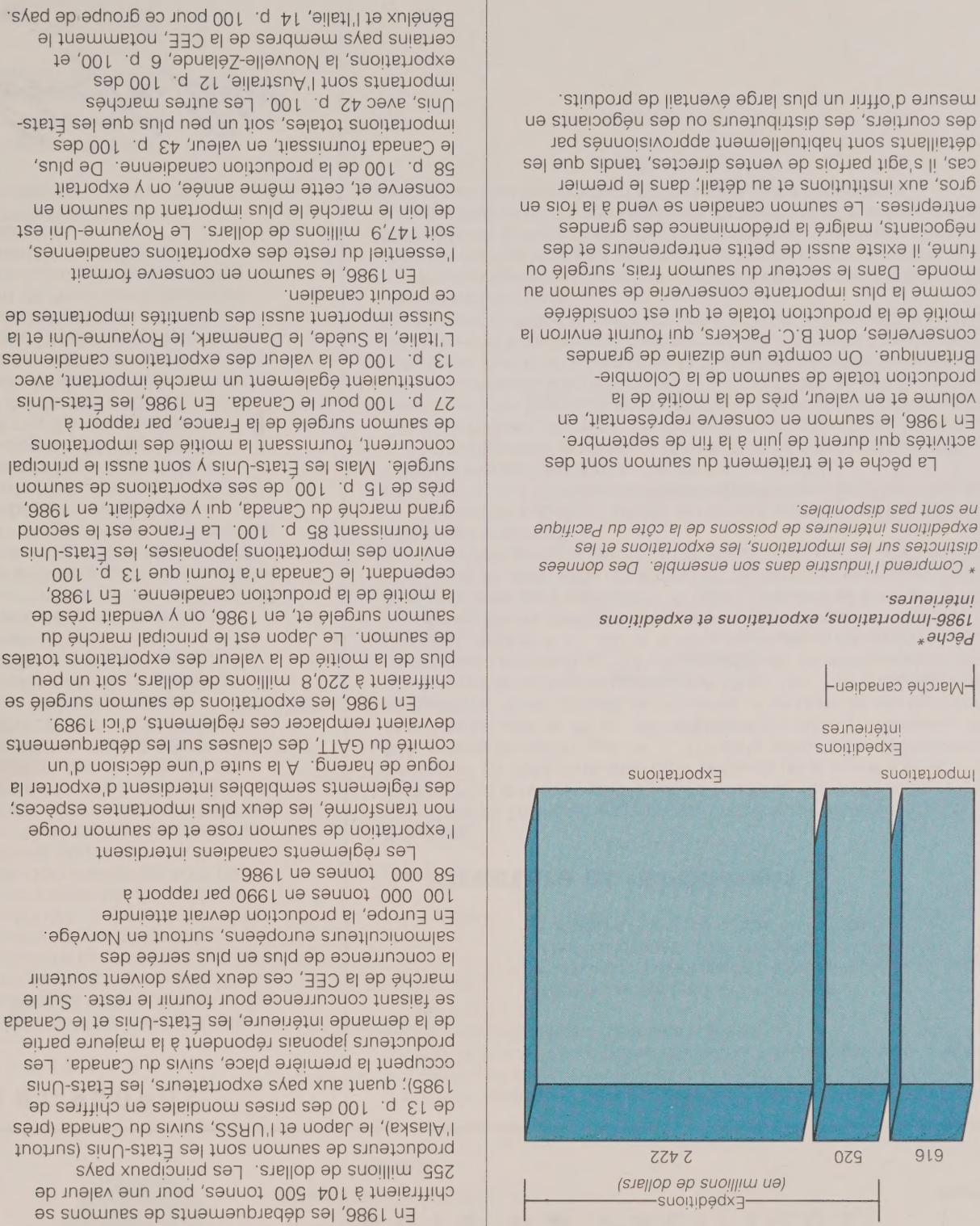
Avant d'évaluer la vigueur financière globale de cette industrie, il faut tenir compte de la fluctuation des ressources. Une étude de ce secteur en Colombie-Britannique, fait le pour la période de 1978-1982, décrit une insuffisance de capitaux, la volonté des actionnaires étant à la baisse. D'après une étude plus récente fondée sur les données de 1982, cet avoir a plus que double, de 1982 à 1986, et le ratio d'endettement à long terme a diminué de moitié, soit 0,5 en 1986. Les derniers débarquements, plus nombreux, ont permis aux chasseurs de:

Il existe cinq espèces de saumon du Pacifique, chacune avec son propre cycle de croissance. Certaines sont nommées, les cycles s'équilibrent, à d'autres moments, les périodes de haute et de faible production de ces diverses espèces coïncident, les cycles ayant concordé, les débarquements ont atteint le chiffre record de 108 000 tonnes. L'année suivante, les prises étaient presque aussi élevées, soit 103 000 tonnes. Les données préliminaires pour 1987 font état d'une bâisse spectaculaire, les débarquements se chiffrent à 66 000 tonnes. Les prises exceptionnelles de 1985 et de 1986 ont permis de recouvrir les stocks de saumon en conservant.

Renement

La pêche au hareng rouge a lieu de février à avril, lorsquée la femelle porte ses œufs. Grandes et petites entrepises de la Colombie-Britannique procèdent à l'évisuion et au salage des œufs avant de les exporter au Japon. La courte durée de la saison exige des régllements très stricts pour protéger cette richesse naturelle et garantir la qualité supérieure déclarée par le marché japonais. La rogue de hareng de la Colombie-Britannique, rogue de première qualité, est très prisée par les Japonais pour qui les critères de qualité sont subtils mais fort importants car par tradition la consommation est forte.

Dépôts que l'industrie de la pêche de la côte du Pacifique se livre à la salmoniculture. Cette innovation intéressera autant les petits éleveurs indépendants qui possèdent deux ou trois cages que les grands sociétés à intégration verticale contrôlant plusieurs exploitations. En Colombie-Britannique, maltes usines de traitement, bien établies, ont concilié des ententes de commerce et de collaboration en partenariat avec des salmoniculteurs et négocié d'autres types d'accords de concertation avec les sociétés norvégiennes. Le volume de la production est stable, environ 1 500 tonnes en 1987, mais il devrait augmenter à 16 000 tonnes d'ici 1990. Sans être comparable aux volumes traditionnels de pêche au saumon, 104 500 tonnes en 1986, la salmoniculture pourra être une excellente source d'approvisionnement lors des périodes creuses du cycle du saumon, comme en 1984, alors que les débordements de saumons n'atteignaient que



Ministre

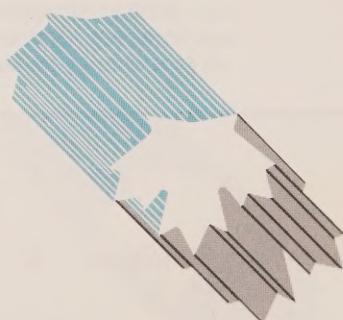
George Washington

1. Structure et rendement

- le poisson de fond de l'Atlantique
- le poisson pélagique de l'Atlantique
- les mollusques et les crustacés de l'Atlantique
- la pêche le long de la côte du Pacifique.

La industrie canadienne de la pêche et des produits dérivés regroupe les activités de ce secteur menées dans la région de l'Atlantique, le long de la côte du Pacifique et la baie du golfe du Canada. Dans ce contexte, une série de profils a été préparée sur les sujets suivants :

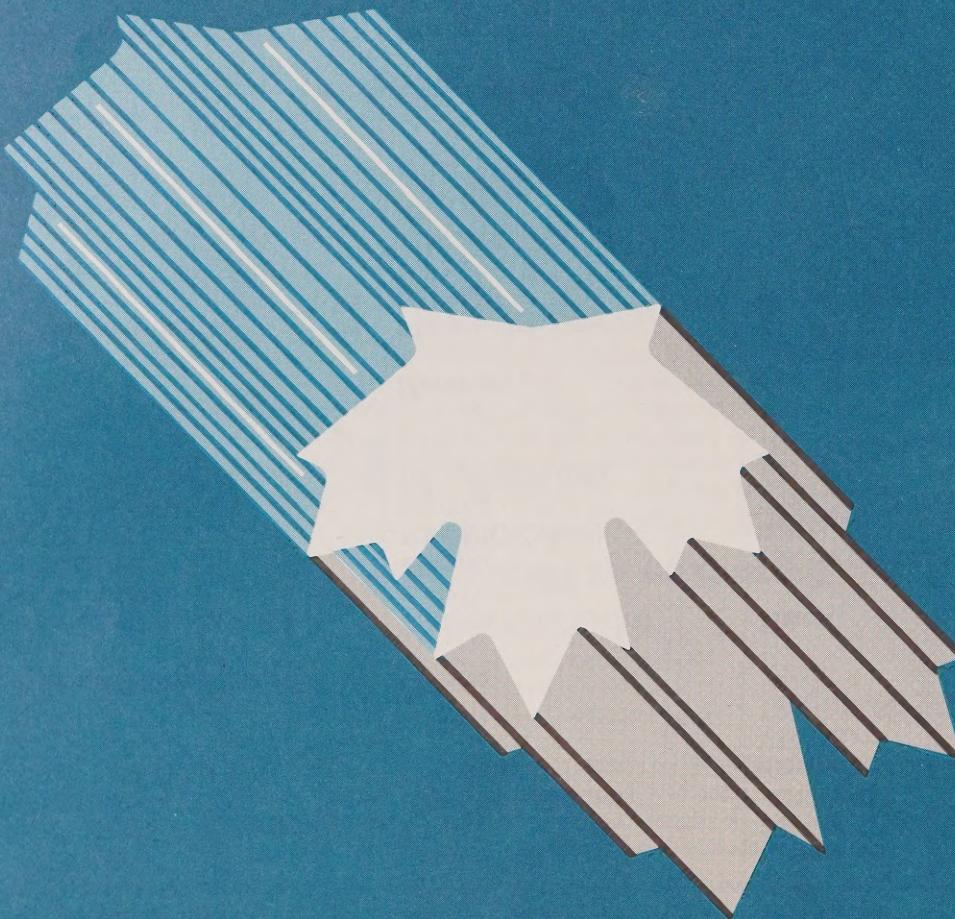
LAURENTIUS P E C H E — D E L' I N D U S T R I E C O T E D U P A C I F I Q U E



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